

K2 FIVE 5.1

Customer Update

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Agenda

- Intro
- Product planning initiatives
- Release details
- Next steps
- Q & A

K2 Process Automation Platform



Workflows

Powerful workflow without code



Forms

Feature-rich forms



Integration

Integrate with anything



Analytics

Deeper insight



Mobile

Make Apps mobile



Security & Governance

Control and compliance



Deployment

Choice of Deployment



Pre-built apps

Build Apps faster

Product Planning – Initiatives

EASY TO BUILD

DEVELOPER EMPOWERMENT

Features and capabilities focused on extensibility and other professional developer-specific needs.

INTEGRATE WITH ANYTHING

Expanding the capabilities of the K2 platform to integrate with any line-of-business system or application through new features and 3rd party partnerships.

INTELLIGENT WORKFLOW

Features and capabilities focused on error-free workflows that support a wide variety of scenarios.

MODERN & CUSTOMIZABLE USER INTERFACES

Enhancements focused on supporting the creation of modern and customized user interfaces for K2 applications.

MODERNIZING BLACKPEARL FEATURES IN CLOUD

Enhancements focused on supporting the creation of modern and customized user interfaces for K2 applications.

RAPID APPLICATION DEVELOPMENT

Features and capabilities focused on improving the speed in which K2 applications can be delivered.

EASY TO MANAGE

ENTERPRISE CLASS APPLICATION DATA STORAGE

Features and capabilities focused on providing secure, enterprise-level storage for K2 application data.

PLATFORM MANAGEMENT AND GOVERNANCE

Features and enhancements focused on providing management capabilities for all aspects of the K2 platform.

PLATFORM USAGE TELEMETRY

Capabilities for tracking usage of K2 components and users at the platform-level.

EASY TO USE

APPLICATION DISCOVERY AND DISTRIBUTION

Features and capabilities focused on sharing and deploying K2 applications across the organization and with the expanded K2 community.

REPORTING ANALYTICS
















Features and capabilities that support richer reporting capabilities for K2 application and line-of-business data.

MAKE APPS MOBILE













Enhancements and new features to improve the ability for K2 applications to be used from any device, at any time.

Initiatives













Modernizing blackpearl features in the cloud

- Service Method Linking 
- SmartBox Property Settings 
- Copy, Cut & Paste 
- Email Groups in Email Step 
- Undo & Redo 
- Move Line Labels 
- Email Groups in Task Step 
- Customize From Address for Email Reminders 
- View Flow Click to Reports 
- Inline Function Block Parity 
- Inline Functions (Conditions / If) 
- Save As 
- Save Function / Function Result 
- Activity Data Fields 
- Dynamic References 












Enterprise class application data storage

- Dedicated Schema 
- Property Encryption 
- SmartBox to SQL Broker Migration Guidance (KB) 
- RLS - Full Data Access 
- RLS - Limited Access 
- Property Indexing 
- Association Indexing 
- Limited Access Group by Roles 
- RLS - Extend Policy 
- RLS - Audit Pages 
- Auditable Entities / Field 
- Property Encryption Updates 
- RLS - Secure By Creator 
- Foreign Keys on Association 

Intelligent workflow









- Workflow Stop 
- Warning Badges 
- Runaway Workflow Warnings 
- Runaway Workflow (Recursive) 
- Warning if no start integration 
- Conditional Start (Backend) 
- Conditional Start (UI) 
- Runaway Workflow (Instance Loop) 
- Call (Multiple) Sub-Workflows 
- Dynamic Sub Workflows 
- Generate Start Form 
- Required Variables 
- Set Default Start Permissions

Platform performance enhancement*









- API Multi-Node Support 
- P&D Multi-Factor Auth 
- Rich Text Control Enhancements 
- Deployment Performance Improvements 
- Workflow API 
- XML Shredding Phase 
- Client Side Script Enhancements 
- Server Side Rule Execution: Control Property Referencing 
- Remove SharePoint Rights Sync 
- Server Side Rule Execution - Additional Mappings 
- Identity On-Prem 

Initiatives (cont.)







Platform management and governance

- K2 for Office 365 Permission 
- Artifact Cleanup / Delete All in Category 
- Site Switcher 
- Implement Modify Permissions 
- Implement Delete Permissions 
- Implement Create Permissions 
- Implement View Execute Permissions 
- Use Roles for Workflow Rights 






Rapid application development

- App Wizard MVP 
- K2 Five-based SmartStarters 
- App Catalog Service 
- App Workspace Improvements 
- SharePoint Dynamic URL 
 - Broker Updates
 - Generated Artifacts SharePoint
 - Generated Workflows
- SharePoint Dynamic URL 
 - Generated Workflows
- Inline SmartObject Designer as Part of Forms Design 
- K2 Apps 
 - Container and Manifest
 - App and Item versioning
 - Lifecycle & App Mover
 - ...


















Modern and customizable user interfaces

- Blue Void Responsive Theme 
- Grey Void Responsive Theme 
- Autumn Responsive Theme 
- Theme Builder / Editor 
- Emerald Responsive Theme 
- Tri-Color Responsive Theme 

Reporting analytics

- Export to Excel (Client Side) 
- Export to Excel (Server-Side) 
- Reporting Controls 
- SmartQuery: 
 - SmartBox
 - SmartObjects
 - SQL Broker
 - Data Modification Methods
 - Load Method and Output Parns 
- SmartBox: Usage Audit Page

Initiatives (cont.)

Integrate with anything	Developer empowerment	Make apps mobile	Platform usage telemetry
<ul style="list-style-type: none">• Salesforce Broker • Exchange Broker • Container based secure data access • Cloud Elements Partnership • Complex type support • File stream support • Improved REST Broker 	<ul style="list-style-type: none">• Workflow API • OData Service OAuth Support • SmartObjects REST Endpoint 	<ul style="list-style-type: none">• Draft forms • Submit Action • Dehydrate/Rehydrate Action 	<ul style="list-style-type: none">• Subscription analytics • User analytics • Tenant analytics • Solutions analytics • Tenant health monitoring

App Wizard

The screenshot displays the App Wizard application interface. On the left is a sidebar with a navigation menu. The main area shows a table of existing apps, and a 'NEW APP' dialog box is open in the foreground.

Navigation Menu (Left Sidebar):

- Apps
- Inbox
- BUILD
- All** (highlighted)
- Published
- Pending Approval
- Drafts
- Admin

Main Area (Background):

- Header: ALL APPS, Michelle McGee, Launch or Manage Apps in your environment
- Actions: + New..., Edit..., Delete..., Launch, Details, Refresh
- Table: My Apps

NAME	TYPE	CREATED ON	CREATED BY	STATUS
Michelle Ad Hoc Task	App Wizard	4/13/2018	Michelle McGee	Generated

NEW APP Dialog Box:

- Approval**: Multiple levels of approval, great for documents, expense claims, and leave requests. [Learn More](#)
- Survey**: Single or multi-page questionnaire with reports. [Learn More](#)
- List Collaboration**: Collect and collaborate on lists of data. [Learn More](#)
- Install from Catalog**: Choose from pre-build Apps with simple settings.



Pre-built apps
Build Apps faster

TARGET AUDIENCE



SmartStarters

The screenshot displays the K2 App Catalog interface. On the left, a sidebar menu under the 'Apps' header includes 'Apps', 'Inbox', and a 'BUILD' section with 'All' (highlighted), 'Published', 'Pending Approval', 'Drafts', and 'Admin'. The main area is titled 'APP CATALOG' and includes a sub-header 'Install a pre-built SmartStarter App from the App Catalog'. Below this, a table lists 'Available SmartStarters' with columns for 'DISPLAY NAME' and 'INSTALLED'. A modal window titled 'APP INSTALLATION' is overlaid, showing the progress of installing an application. The modal contains the text 'Installing Application' and 'Do not close this window until "Registration Complete" is displayed, this may take a few minutes.' It also shows three status indicators: 'Download Complete' with a green checkmark, 'Install Complete' with a green checkmark, and 'Registering...' with a circular arrow icon. The background table lists various apps such as 'Ad Hoc Task Management', 'Change Management Request', 'Charitable Giving Assessment', 'Corporate Media Library', 'Custom', 'Defect', 'Disbursement', 'Document', 'Employee', 'FAQ', 'HR Enquiry', 'IT Asset Request', 'IT Issue Report', 'IT Service Request', 'Job Posting', 'Meeting Room Booking', 'New Hire Submission', 'Publish KB Article', 'Sales Opportunity Setup And Amend', 'Social Media Post Review', and 'System Access Request'.

Apps

Apps

Inbox

BUILD

All

Published

Pending Approval

Drafts

Admin

Michelle McGee

APP CATALOG

Install a pre-built SmartStarter App from the App Catalog

Available SmartStarters

Install Details Refresh

DISPLAY NAME INSTALLED

Ad Hoc Task Management

Change Management Request

Charitable Giving Assessment

Corporate Media Library

Custom

Custom

Defect

Disbursement

Document

Employee

Employee

FAQ

HR Enquiry

IT Asset Request

IT Issue Report

IT Service Request

Job Posting

Meeting Room Booking

New Hire Submission

Publish KB Article

Sales Opportunity Setup And Amend

Social Media Post Review

System Access Request

APP INSTALLATION

Installing Application

Do not close this window until "Registration Complete" is displayed, this may take a few minutes.

Download Complete ✓

Install Complete ✓

Registering... ↻



Pre-built apps
Build Apps faster

Who Can Build and Approve AppWizard Apps?

Everyone

- Build apps, but need administrator approval to generate
- Manage and delete the apps they create

App Wizard Builders

- Build and generate apps without administrator approval
- Manage and delete the apps they create

App Wizard Administrators

- Build and generate apps without approval
- Manage and delete all apps
- Responsible for approving apps
- Manage the App Wizard Builder and Administrator roles

DEMO

Workflow Designer Undo / Redo

- Steps AND configuration
- No limit within the session
- Resets after editing session exit
- Supported through UI buttons
- Standard keyboard shortcuts –
 - Ctrl-Z / Ctrl-Y on Windows
 - Command ⌘-Z / Command ⌘-Y on Mac OS



Workflows

Powerful workflow without code

Workflow Designer Copy / Cut / Paste

- Steps AND configuration
- Can drag and multi-select a branch
- Standard keyboard shortcuts –
 - Ctrl-C / Ctrl-X / Ctrl-V on Windows
 - Command ⌘-C / Command ⌘-X / Command ⌘-V on Mac OS



Workflows

Powerful workflow without code

SmartAssist Warning Badges

- Intelligent workflow
- Warns but does not block deployment



Deploy

Publish a major version of this workflow



You may have infinite loops if you deploy this workflow. You can still deploy if this is intentional.
[Learn More...](#)



Delete

Remove this workflow definition



Workflows

Powerful workflow without code

SmartAssist Infinite Loop Warning

The screenshot displays the SmartAssist workflow editor interface. At the top, a navigation bar includes a 'BACK TO MTOLYMPUS' button, a user profile for 'Michelle McGee', and standard application icons. The main workspace is a grid where a workflow is being constructed. A green play button icon is positioned above a step labeled 'Update List Item', which is highlighted with a blue border and a yellow warning icon. An arrow points from the play button to this step. On the right side, a configuration panel for the 'Update List Item' step is visible. It contains sections for 'LIST ITEM' (with options to 'Pick List Item' or 'Find List Items', currently set to 'Pick List Item' with a dropdown menu showing 'Accounts list - MM'), 'PROPERTIES' (with a text input field labeled 'Properties'), and 'USE LIST ITEM LATER' (with a 'Create' button). At the bottom left, an 'Errors' dialog box is open, displaying a yellow warning icon and the message: 'Step "Update List Item" triggers an event that could start another instance of this workflow causing a recursive loop. Please verify that the behavior specified is correct.' A 'SHOW ME...' link is also present in the error message.



Workflows
Powerful workflow without code

Email Groups in Email Step

- Search for and select AD groups when configuring addressees for email steps
- Only for **Send Email** step and **Task Reminder Emails**



Workflows

Powerful workflow without code

WFD Deployment Performance Improvements



Deploy

Publish a major version of this workflow



Workflows

Powerful workflow without code

Export to Excel in List Views



Forms

Feature-rich forms

DEMO

Themes: Grey and Blue Void

Accounts

Selected Filter: Default Quick Search: All fields

TITLE	STATUS
Abstergo Industries	Inactive
Bluth Company	Active
Cyberdyne Systems	Active
Duff Beer Co.	Active
Genco Olive Oil	Active
GloboChem	Active
InGen	Active
KrebStar	Active
Mom's Friendly Robot Corporation	Active
Nakatomi Corporation	Active

<< < 1 >

B I U "Open Sans" 12px

Type a value

Design HTML

Accounts

Selected Filter: Default Quick Search: All fields

TITLE	STATUS
Abstergo Industries	Inactive
Bluth Company	Active
Cyberdyne Systems	Active
Duff Beer Co.	Active
Genco Olive Oil	Active
GloboChem	Active
InGen	Active
KrebStar	Active
Mom's Friendly Robot Corporation	Active
Nakatomi Corporation	Active

<< < 1 >

B I U "Open Sans" 12px

Type a value

Design HTML



Forms
Feature-rich forms

Exchange Broker – Feature Activation

The screenshot displays the K2 Management console interface. On the left is a navigation pane under the 'Management' tab, listing various components like Dashboard, Categories, Features (highlighted), Servers, Authentication, Integration, Service Types, Service Instances, SmartObject Security, SmartBox Security, SmartBox Object, APIs, Workflow Server, Users, Designer, Licenses, and Mobile. The main area shows the 'Features' section with a table listing 'Exchange' and 'Salesforce'. A modal window titled 'Add Feature Instance' is open, showing the 'Exchange' logo and a form to configure a new instance. The form includes fields for Name (Exchange 1), Description (A service for integrating with Exchange.), and EWS URL (https://outlook.office365.com/EWS/Exchange.asmx). Under the 'Authentication' section, 'OAuth' is selected with a domain of k2density.onmicrosoft.com. There are also options for 'Integrated' and 'Static' authentication. A note at the bottom states: 'Note that you may be prompted to login multiple times during setup.' An 'Add' button is at the bottom right of the modal.

Management

- Dashboard
- > Categories
- Features**
- Servers
- > Authentication
- Integration
 - Service Types
 - Service Instances
 - SmartObject Security
 - SmartBox Security
 - SmartBox Object
- > APIs
- Workflow Server
- > Users
- Designer
- Licenses
- Mobile

Features

+ New Instance

NAME	DESCRIPTION	INSTANCES
DocuSign		
Exchange		
Salesforce		

Feature Instances

Edit Refresh

NAME	DESCRIPTION
Exchange	

Add Feature Instance

Exchange

Set up your connection to Exchange to enable features in K2.

Name: Exchange 1

Description: A service for integrating with Exchange.

EWS URL: https://outlook.office365.com/EWS/Exchange.asmx

Authentication

☒ OAuth

Domain: k2density.onmicrosoft.com

[Where can I find this?](#)

☐ Integrated

☐ Static

Note that you may be prompted to login multiple times during setup.

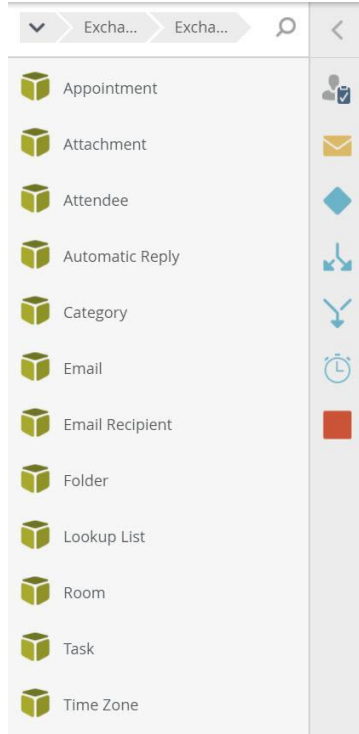
Add

Michelle McGee

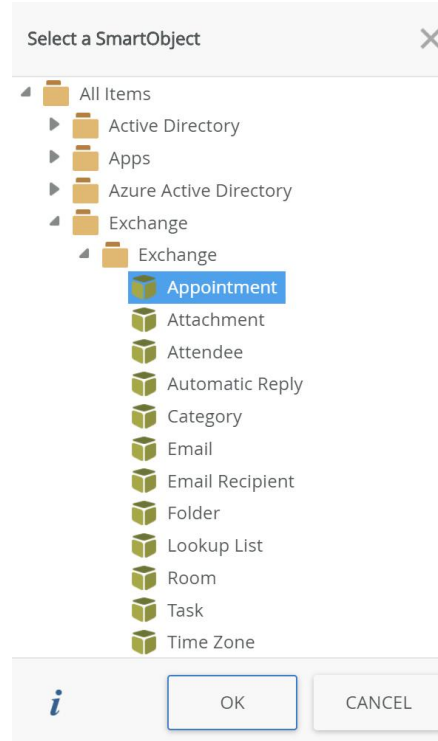


Integration
Integrate with anything

Working with Exchange SmartObjects



In Workflow Designer



In Rule Designer



Integration
Integrate with anything



Salesforce Broker

The screenshot displays the 'Management' dashboard of the Salesforce Broker. The left sidebar contains a navigation menu with options: Dashboard, Categories, Features (selected), Servers, Authentication, Integration, Service Types, Service Instances, SmartObject Security, SmartBox Security, SmartBox Object, APIs, Workflow Server, Users, Designer, Licenses, and Mobile. The main area shows a 'Features' table with columns 'NAME' and 'INSTANCES'. The 'Salesforce' feature is highlighted in blue. Below the table, the 'Feature Instances' section is visible. A modal dialog titled 'Add Feature Instance' is open, showing the Salesforce logo and a form to specify integration details. The form includes fields for Name, Description, OAuth Client Id, OAuth Client Secret, and OAuth Redirect URL. Below the form, there is a section titled 'How to enable Salesforce for K2 integration' with a list of steps.

Management

- Dashboard
- Categories
- Features**
- Servers
- Authentication
- Integration
 - Service Types
 - Service Instances
 - SmartObject Security
 - SmartBox Security
 - SmartBox Object
- APIs
- Workflow Server
- Users
- Designer
- Licenses
- Mobile

Features

NAME	INSTANCES
DocuSign	0
Exchange	1
Salesforce	0

Feature Instances

Edit Refresh

Add Feature Instance

Specify the following details for the integration.

Name: Salesforce

Description: A service for integrating with Salesforce.

OAuth Client Id: Type a value

OAuth Client Secret: Type a value

OAuth Redirect URL: https://5MR7ZUY.onk2qa.com/identity/token/oauth/2

OK

How to enable Salesforce for K2 integration

1. Log into Salesforce
2. In Build menu on left, click Create and then Apps
3. In Connected Apps section click New
4. Enter in the required Fields:
 - a. Connected App Name: Salesforce for K2
 - b. API Name: Salesforce_for_K2
 - c. Contact Email: [your email address]
5. Check the box to enable OAuth settings, enter the redirect URL above as the Callback URL
6. Add the OAuth Scopes:
 - a. Full access (full)
 - b. Perform requests on your behalf at any time (refresh_token, offline_access)
7. Save
 - a. You may receive a message about needing to wait a few minutes for your changes to take affect
 - b. You shall eventually see a screen with summary information, take note of the Consumer Key and click to reveal the Consumer Secret



Integration
Integrate with anything

SmartBox Enhancements

In:

- Property settings
- Dedicated schema
- Property encryption

On the roadmap

- RLS*
 - Full data access*
 - Limited data access*
 - Extend policy
 - Limited access by user / group / role
 - Audit pages
 - Secure by creator
- Migration guidance for SmartBox to SQL Broker*
- Property indexing
- Association indexing
- Auditable entities / field
- Foreign keys on association
- Property encryption updates



Integration
Integrate with anything

Authorization Framework

Security rights

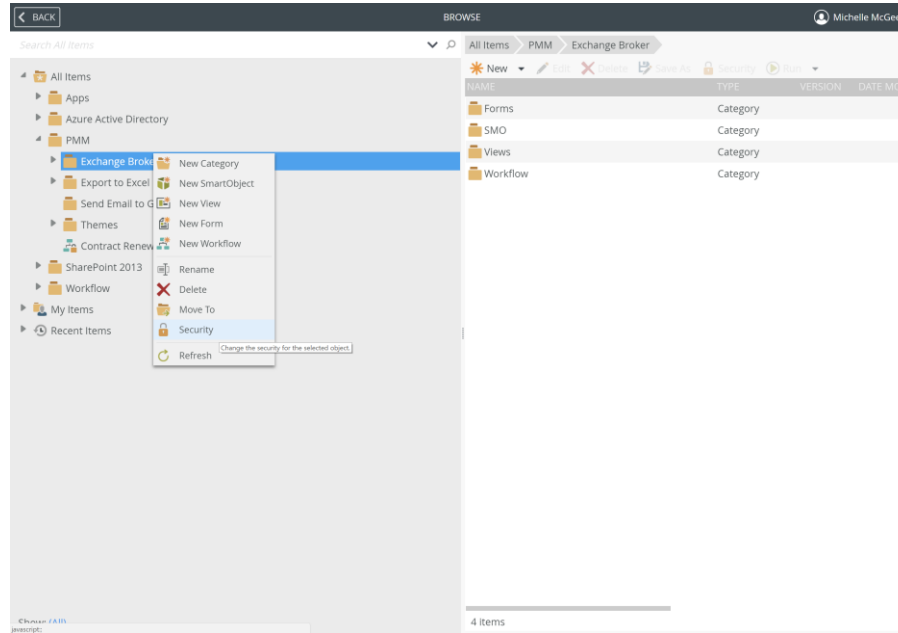
Modify rights

On the roadmap:

Delete rights

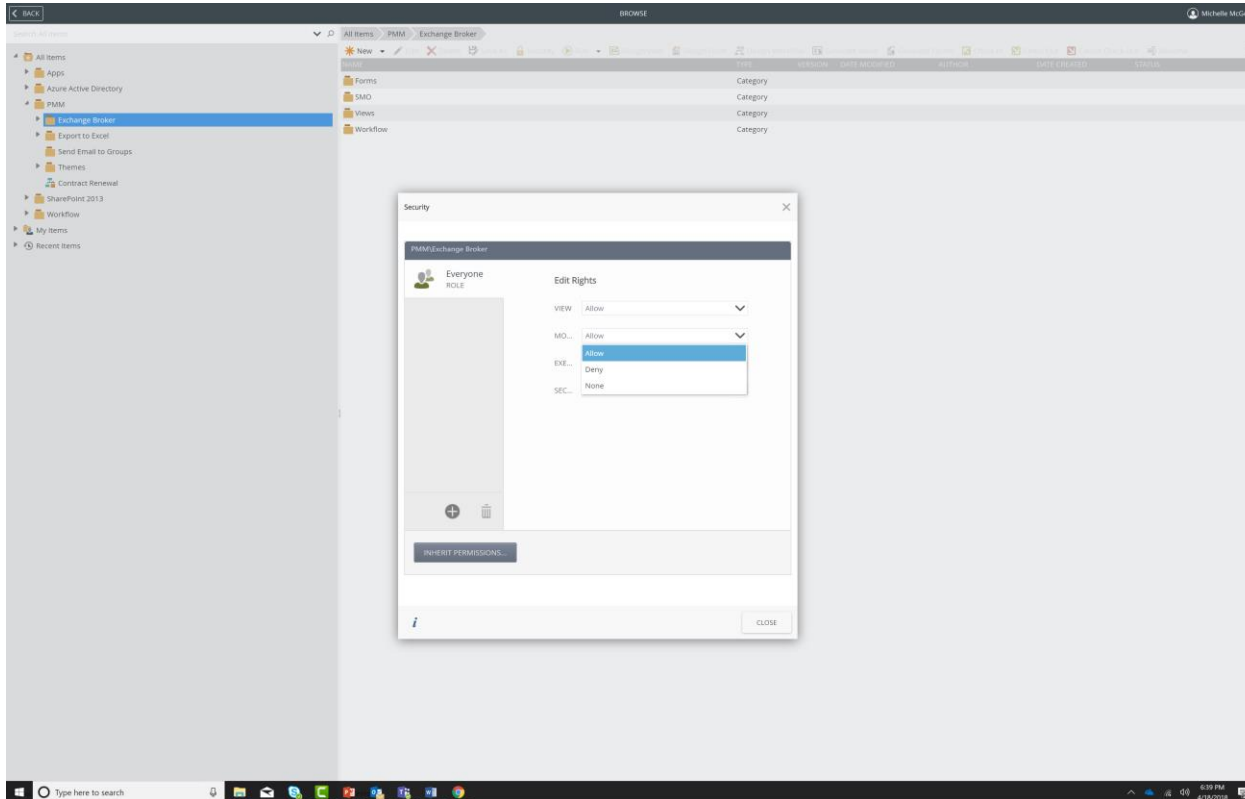
Create rights

View execute rights



Security & Governance
Control and compliance

Authorization Framework



Security & Governance
Control and compliance

Delete All In Category

Blood Drive Appointment Times

Rename | Move | Delete

NAME	CREATED BY	CREATED DATE	MODIFIED BY	MODIFIED DATE	STATUS
Blood Drive Appointment...	Michelle McGee	4/17/2018	Michelle McGee	4/17/2018	
Blood Drive Appointment...	Michelle McGee	4/17/2018			

Security

Everyone
ROLE

Delete Category?

Deleting this category will delete all files and subcategories contained within this folder.

2 SmartObject(s)

Any dependencies upon the contents shown will be broken upon deletion.

Smartbox SmartObject deletion will result in loss of all data related to the SmartObject(s) deleted.

☐ Delete all workflow historical log data

To confirm deletion of this category and all subcategories, forms, views, SmartObjects and workflows, type "Delete" in the box below and click the **Delete Category** button.

THIS ACTION CANNOT BE UNDONE.

Delete Category Cancel

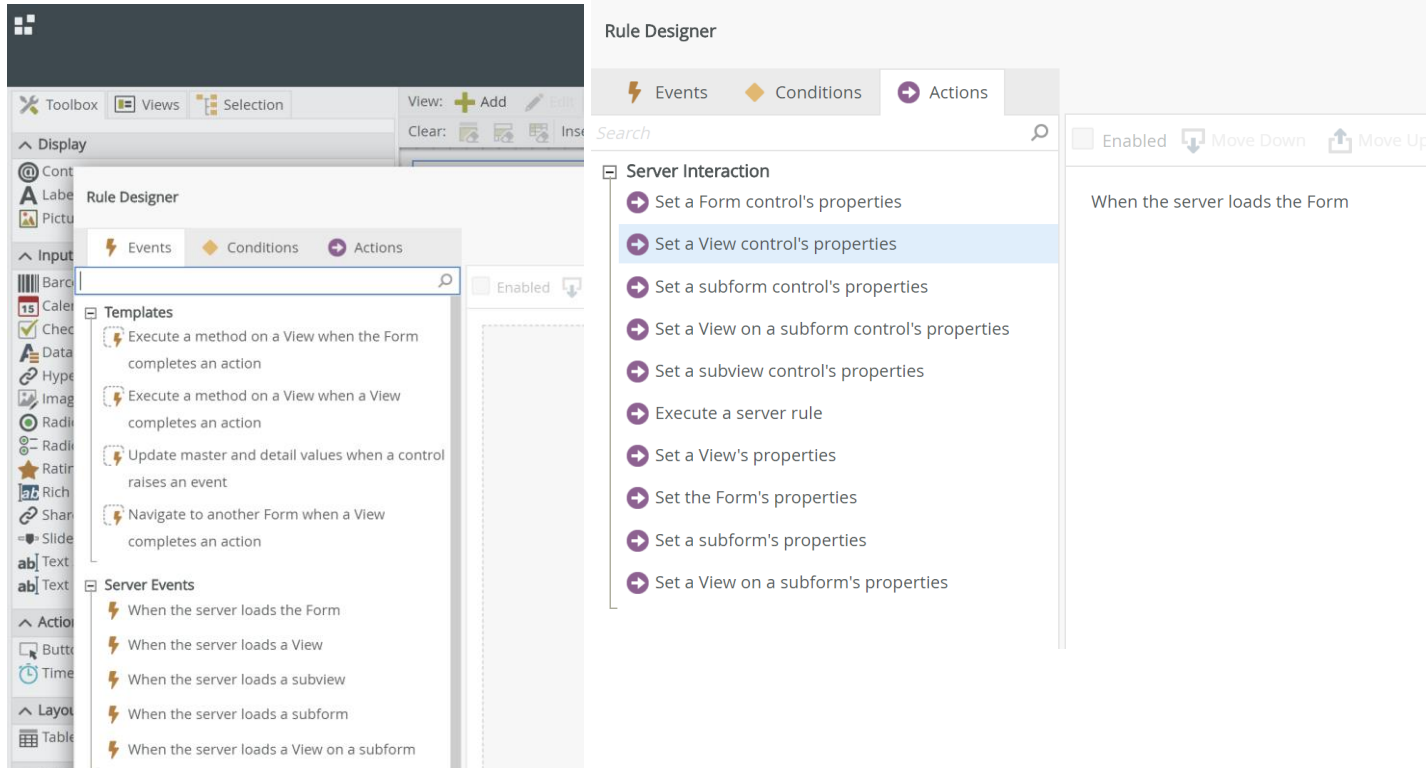
BREAK INHERITANCE...



Security & Governance
Control and compliance

DEMO

SmartForms Server Events for Control Property Rendering



The screenshot displays the SmartForms Rule Designer interface. On the left, a sidebar shows a tree view of the form structure, including sections for Display, Input, and Action. The main area is titled 'Rule Designer' and features three tabs: Events, Conditions, and Actions. The 'Events' tab is selected, showing a list of server events under the 'Server Events' category. The event 'When the server loads the Form' is highlighted. To the right, a 'Rule Designer' panel shows a list of actions under the 'Server Interaction' category. The action 'Set a View control's properties' is highlighted. Below the list of actions, a description reads 'When the server loads the Form'.

Rule Designer

Events Conditions Actions

Search

Enabled Move Down Move Up

Server Interaction

- Set a Form control's properties
- Set a View control's properties
- Set a subform control's properties
- Set a View on a subform control's properties
- Set a subview control's properties
- Execute a server rule
- Set a View's properties
- Set the Form's properties
- Set a subform's properties
- Set a View on a subform's properties

When the server loads the Form



Forms
Feature-rich forms

WFD Deployment Performance Improvements

- Cloud Update 3



Deploy

Publish a major version of this workflow



Workflows

Powerful workflow without code

DEMO

Next Steps

Get Ready!

K2 Five 5.1 will be available at the end of the month

Q&A

THANK YOU.